

Beyond Just Getting By: How to Build a Sustainable Base of Philanthropic Support

Nonprofit Leaders Conference for
Coastal & Southwest Washington

Workshop Presented by
Jan F. Brazzell, PhD, ACFRE

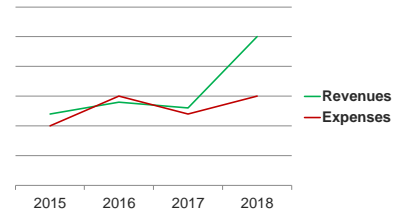


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Helping You Move Your Organization Forward

Beyond Just Getting By

What Do You Hope to Take Home from
this Workshop?



Quick Overview

- Case One: The Windfall
- Where Windfalls Come From
- Growing Your Base of Loyal Contributors:
Why and How
- Infrastructure Matters
- Case Two: Another Fundraising Event?
- Your Questions

Case One: The Windfall

- Take 10-15 minutes
- Ask someone at your table to read the
case aloud, while others follow along
- Share with one another your favorite
options and discuss their pros and cons
- Decide what actions your table would
recommend and why
- Choose someone to present

[Your Take on Case One]

[Where Windfalls Come From]

- Long-time, loyal contributors
- Past or current board members
- Sometimes, out of the blue
 - Relative or friend of a loyal contributor
 - Grateful past recipient of services
- Legacy gift marketing efforts

[Are You Prepared (or Preparing) for a Windfall?]

- Does you have a windfall policy?
- Do you have policies for accepting gifts of real estate and other property?
- Do you have protocol in place for handling gifts of securities, life insurance, transfers from IRAs, etc.?
- Do you educate your supporters about legacy gift opportunities?

[Why People Give]

Top Three Deciding Factors:

- Trust (82%)
- Impact in one's community (78%).
- Personal relationships (75%)

Other Deciding Factors:

- Ease and convenience (68%)
- Involvement (59%)

Source: Cone Communications (2007)

Growing Your Base of Loyal Contributors: Quick Test

On average, what percentage of new donors give again the following year?

- A. 18%
- B. 45%
- C. 69%

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Growing Your Base of Loyal Contributors: Quick Test

On average, how much does it cost to raise \$1.00 from a new, first-time donor?

- A. \$0.10
- B. \$0.20
- C. \$0.50
- D. \$0.75
- E. \$1.25

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Growing Your Base of Loyal Contributors: Quick Test

How much does it usually cost to raise \$1.00 from donors who gave last year?

- A. \$0.10
- B. \$0.20
- C. \$0.50
- D. \$0.75
- E. \$1.25

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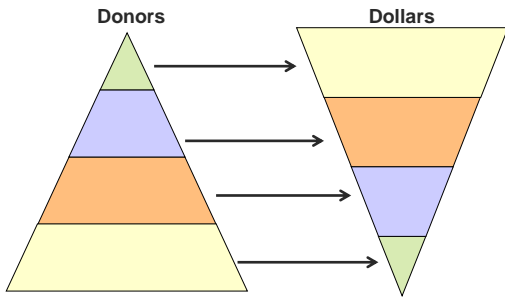
Growing Your Base of Loyal Contributors: Quick Test

What is the most likely reason an organization will lose donors?

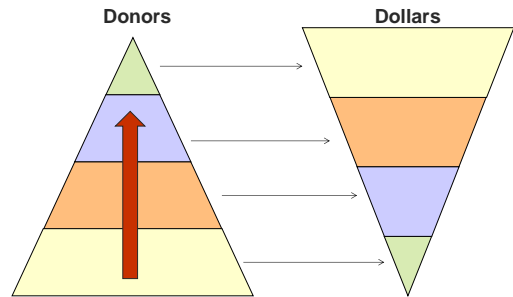
- A. Too much spent on administration
- B. Death/relocation
- C. Unsatisfactory complaint-handling
- D. Won by another nonprofit
- E. Lack of interest from the organization

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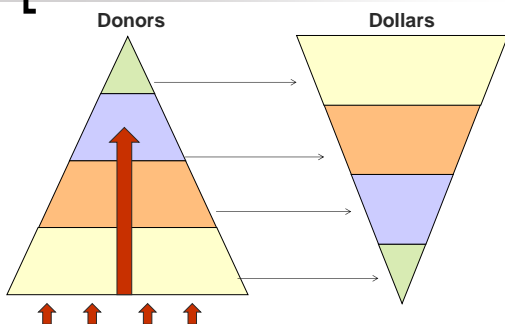
[Sustainable Base: the 95 – 5 Rule]



[All Levels Matter Over Time]



[Achieving Sustainability: A Never-Ending Process]



[Increasing Lifetime Value: What Donors Want]

- Prompt, personalized acknowledgement
- Confirmation that gifts will be used as intended
- Desired impact: measurable results before being asked again
- Mutual control of the relationship

Show your donors they matter to you!

Stewardship Matters

Example: Leveraging Events

- Keep “cause” front and center
- Steward event participants
 - Sponsors
 - Volunteers/table hosts
 - Contributors
- Ask for feedback and preferences
- Segment and target appropriately

Develop a More Comprehensive Approach

- Events
- Grant proposals
- Broad personal appeals
 - Best if segmented and personalized
 - Highlight monthly giving options
 - Solicit preferences, offer opportunities for further information and engagement
- Personal visits
 - Major and legacy gifts, charitable planning

Philanthropic Relationship-Building Requires Human Resources



Infrastructure Matters!

- Policies and procedures
- Constituent relationship management system (CRM)
- Equipment that works
- Materials for donor stewardship

Trying to raise more money without the proper tools will COST you!

Case Two: Another Fundraising Event?

- Take 10-15 minutes
- Ask someone at your table to read the case aloud, while others follow along
- Discuss what strategies are needed
- Decide what to recommend to the CEO and Board, and why
- Choose someone to present

Your Take on Case Two

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Your Questions

Thank You!

You are welcome to contact:

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